



## Direct Messaging

### Administrator User Guide – Adding Users

Direct Administrators are responsible for managing users for their organization. This includes adding users, assisting with training, removing access, etc. The following provides information on how to add users.

## User Registration Options

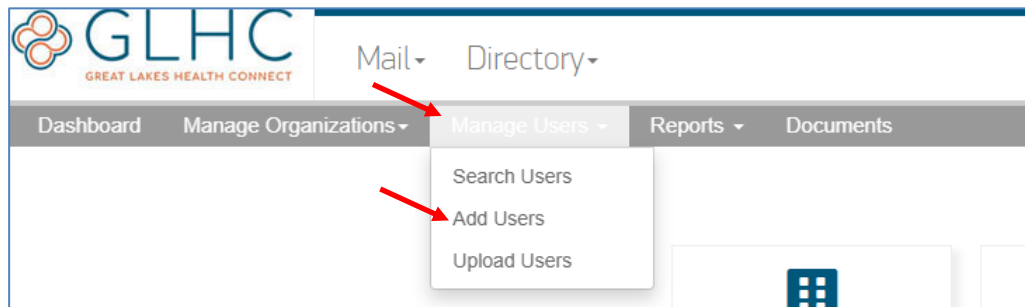
There are two ways to add users:

1. Add users one by one
2. Upload a list of users

### Add Users One by One

Use this option to create users one at a time.

1. Click **Manage Users** and then **Add Users**.



2. On the next screen enter applicable information about the user.
  - a. General Information
    - Prefix: Optional field
    - First and Last Name: Mandatory
    - Credential: Optional field
    - Organization: Select the organization from the dropdown menu
    - User Type: Will default to "Professional"
    - Username: Mandatory
    - Contact Email: Mandatory for the user to complete their registration.
  - b. **Require ID Proofing** checkbox - **Do not** check this box. If selected in error, you will need to delete the user and recreate their account.

- c. **Direct Email** checkbox - If the user will need their own individual Direct Address, check box. An administrative user may not need their own Direct Address. However, GLHC recommends that Direct Admins have one because it is advantageous to have a mechanism to securely exchange information.
    - i. **Note:** If a duplicate Username or Direct Address is requested, a unique number will be added to the Username and/or Address. For example, if the Direct Address of *andrea.smith@directaddress.net* has already been used by another person the Direct Address will become [andrea.smith1@directaddress.net](mailto:andrea.smith1@directaddress.net).
  - d. Select the appropriate **Privileges** for the user. Privileges will display based on the settings of your domain.
    - o **Send Invites: Do not** check this box. These users would have to go through the identity verification process.
    - o **Administrator:** Provides additional abilities to view reports and manage users.
    - o **Create Users:** Provides the ability for the Administrator to create additional users.
3. Click **Register** to save.

### User Registration

Use this form to pre-register individuals to receive an email notification that an account has been created for them. They will be able to log in with a temporary password and begin using the system. Their contact information will be available immediately in the User Directory.

Prefix:

First Name:

Last Name:

Credential:

Organization:

User Type:

Username:

Contact Email:

Require ID Proofing:       Direct Email:

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### Privileges

Send Invites:       Administrator:

- Create Users:

The user will receive an email at their Contact Email prompting them to activate their new DIRECT account.

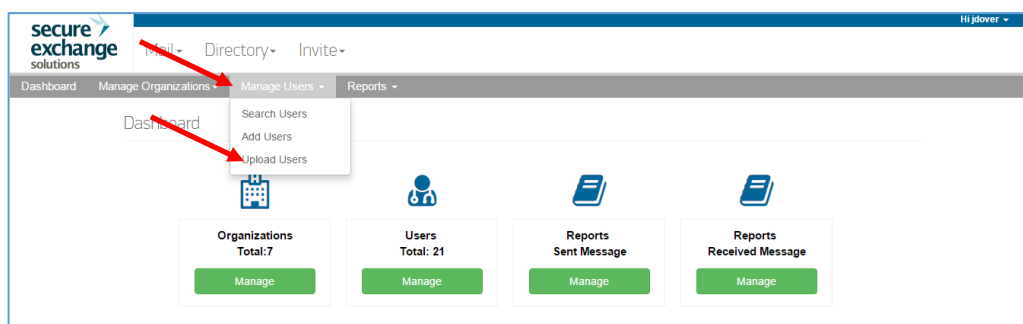
**Important:** Please see the last section of this Guide, if a user is supposed to have access to the Organization's Direct messages. This feature assigns an

Organization/Shared Email to the User. Organization/Shared Emails allow users to have their own Direct Address as well as access a Shared Organization Direct Address to view the Organization's Direct messages.

### Upload a list of users

To register more than one user at the same time, use the "Upload Users" functionality. This process involves entering user information into a CSV template and then uploading it into the Direct Portal.

1. Click **Manage Users** and then **Upload Users**.



The next page on the left hand side of the screen displays the various upload fields including which fields are required or optional.

#### User Upload Requirements

Data in the CSV file prepared for upload must not contain any commas (CSV format uses comma as a field separator, any comma within the field will throw off the formatting). First line in the file is a fixed header that contains field names as shown in the screen shot of the sample file below. Header line is also included in the CSV template. Please be sure to save your upload file in the CSV (comma separated values) format.

- **User Type:** Always enter Professional with exact case and characters. *(required)*
- **Prefix:** Enter Ms, Mr, Miss, Mrs, Dr, or Prof with exact case and characters. *(optional)*
- **First Name:** 20 character limit. *(required)*
- **Last Name:** 35 character limit. *(required)*
- **Credential:** Enter credential with case and characters (M.D. or MD, etc.). If you have more than one credential, please insert a space in between the credentials. *(optional)*
- **Contact Email:** Contact Email Address. *(required)*
- **Username:** Username to login to the system. *(required)*

2. Below the upload requirements, find the links to download the CSV File Template, view the NUCC Taxonomy Codes, and view a sample of a completed CSV File.

- **Address 1:** 100 character limit. *(required)*
- **Address 2:** 100 character limit. *(optional)*
- **City:** 100 character limit. *(required)*
- **State:** State Abbreviation. 2 character limit. Uppercase Only. *(required)*
- **Zip Code:** 5 character limit. *(required)*
- **Requested Direct Address:** Must include the full Direct Address including domain. *(required)*

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CSV File Template: [Download](#)

NUCC Taxonomy Codes: [View](#)

Sample CSV File Screenshot: [View](#)

3. Select the "CSV File Template: Download" to access the file.
4. After downloading, completing, and saving the spreadsheet to an appropriate file locate the following screen on the right hand side of the **Upload Users** screen.

### Upload CSV File

**Organization:**

**Select CSV file:**  
 No file selected.

**Note:** The MS Excel spreadsheet must be saved as a CSV format that contains a .csv extension.

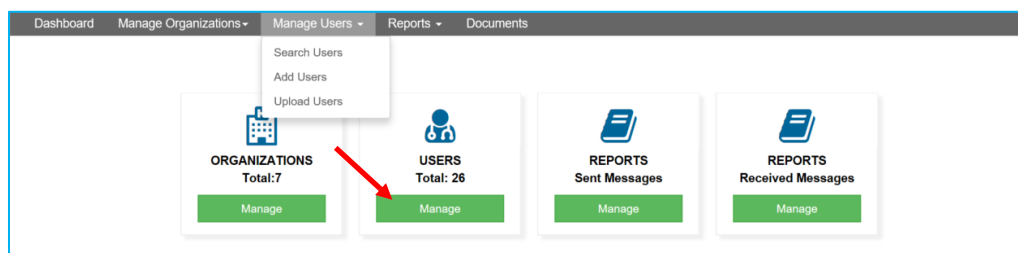
**Email Notifications:**

**Note:** After upload, a confirmation email will be sent to the provided contact email address for each successfully created account with the user's ID and a temporary password. If the checkbox is unchecked, new users created in the upload process will not receive their account information and will not be able to access the site and webmail.

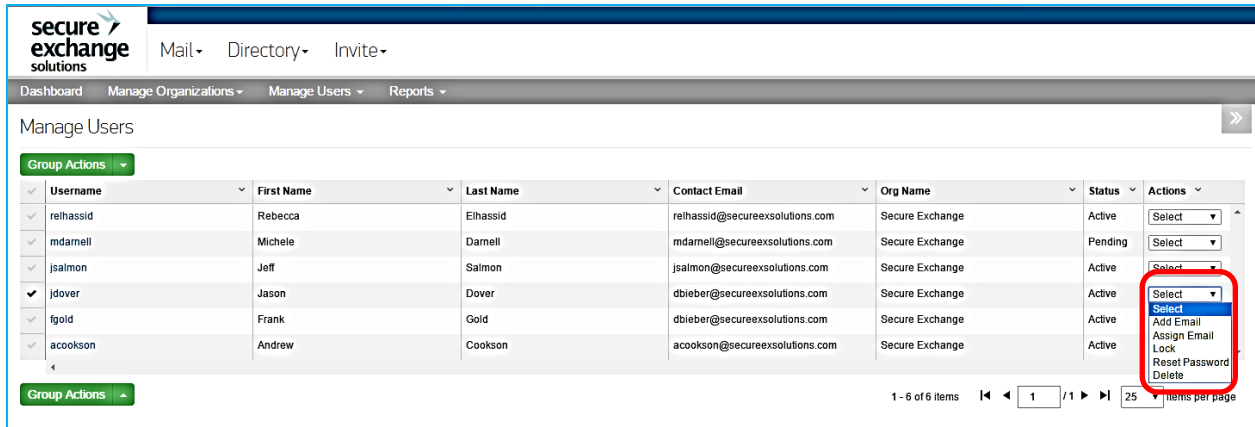
5. Select the Organization from the dropdown
6. Select **Browse** and locate the CSV file on your computer.
7. **Email Notifications checkbox** – this will send a confirmation email to the provided contact email address for each successfully created account. The email will contain user ID and temporary password.
  - **Note:** If users will not be accessing their mailbox via the portal and you would like the account to be automatically activate after upload, you can uncheck the Email Notifications box. This should only be done when your application will be using the API or XDR Edge Protocols for managing messages.
8. Click **Upload**

## Providing Access to an Organization's Direct Messages

1. Click on the green button labeled **Manage** under Users in the "Dashboard".

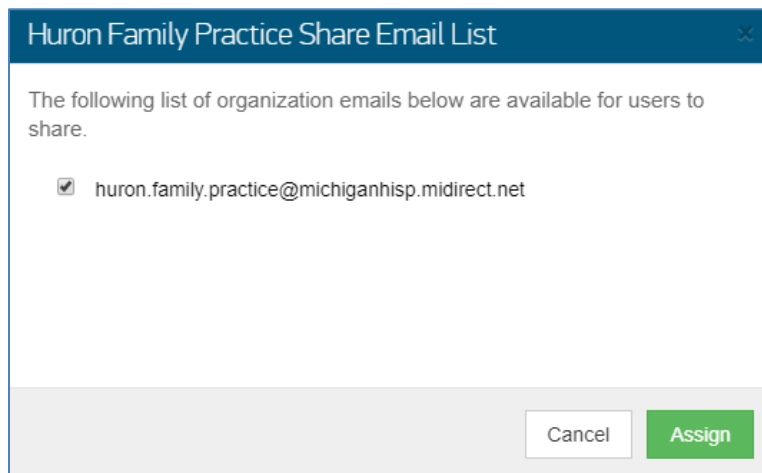


2. Locate the User and click the "Actions" dropdown menu located under the "Actions" column on the right hand side of the table. Select **Assign Email**.



Username	First Name	Last Name	Contact Email	Org Name	Status	Actions
reihasid	Rebecca	Eihassid	reihasid@securexsolutions.com	Secure Exchange	Active	Select
mdarnell	Michele	Darnell	mdarnell@securexsolutions.com	Secure Exchange	Pending	Select
jsalmon	Jeff	Salmon	jsalmon@securexsolutions.com	Secure Exchange	Active	Select
jdober	Jason	Dover	dbieber@securexsolutions.com	Secure Exchange	Active	Select Add Email Assign Email Lock Reset Password Delete
fgold	Frank	Gold	dbieber@securexsolutions.com	Secure Exchange	Active	Select
acookson	Andrew	Cookson	acookson@securexsolutions.com	Secure Exchange	Active	Select

3. Check the box to the left of the organization's email and then click "Assign" to save. The user may need to either refresh the webpage or log out and then log back in to view messages.



### Huron Family Practice Share Email List

The following list of organization emails below are available for users to share.

- huron.family.practice@michiganhisp.midirect.net

Cancel Assign